



White House Conference on Aging Solutions Forum

ASA/NCOA Joint Conference

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Statement by Richard P. Adler

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San Francisco, CA

Good morning and thanks for the opportunity to speak with you.

My name is Richard Adler and I am vice president of Civic Ventures. We are a national nonprofit organization whose mission is to expand the contributions of older Americans to society and to transform the aging of America into a source of individual and social renewal (see Attachment A for more about Civic Ventures). In my remarks this morning, I will attempt to reflect not just my own views, but those of my colleagues at Civic Ventures and those in other organizations working for common purposes. However, I take sole responsibility for this statement.

It is encouraging to see that the 1995 White House Conference on Aging passed a resolution that called for

► Expanding and enhancing opportunities for older volunteers

While volunteering is an important element of civic engagement, and should continue to be encouraged, volunteering is just one element. In considering the issue of civic engagement in 2005, we need to take account of a number of developments that have enabled us to see this issue in a broader context:

1. We have recognized that the opportunity to remain socially engaged is an important factor in successful aging;
2. We have also recognized that America's aging population represents an enormous reservoir of talent and experience that we as a society cannot afford to discard. We have an opportunity to match a growing older population with some of society's most pressing needs.

3. Finally, we have recognized that ***civic engagement is much more than senior volunteering. It encompasses the entire range of productive activities – unpaid and paid – that contribute to making our society a better place.*** We know that a substantial majority of the Baby Boomers want to keep working past the traditional age of retirement. Their reasons for wanting to work go beyond just the need for income, and include such things as the desire to remain productive and the desire to help others. Policies are needed that will support this full spectrum of civic engagement by older adults.

Beyond this, in the last ten years, we have seen the development of a number of new models for engaging older adults in valuable activities. In addition to these projects in Arizona, there are a number of local and national initiatives that have been launched in the past few years to promote greater engagement. Earlier this week, during a Special Program Day on Civic Engagement, we heard about exciting local initiatives that are attempting to expand opportunities for engagement of older residents in places like **Cleveland, Chicago, Philadelphia, and Winter Park, Florida.**

And there are a number of promising new national initiatives that are working to increase awareness of the potential value of older adults as resources among the general public and among key professional groups. Among these are initiatives at the **American Society on Aging, the National Council on the Aging, the Gerontological Society of America** and the **Harvard School of Public Health** (see attachment B for summaries of these local and national projects).

Two weeks ago, Civic Ventures, along with GSA, hosted a WHCoA Forum in Phoenix, Arizona that heard about several exciting new initiatives that are expanding opportunities for civic engagement in Arizona:

- We heard about **the Tucson Experience Corps**, the most recent local project of this national service program that began in 1998 and now operates in 13 communities around the country. Experience Corps members serve as mentors and literacy tutors for elementary school children. Members commit to working up to 20 hours a week for a year and receive small stipends that are provided through AmeriCorps (see Attachment C for more details about this program).
- We heard about the new **Life Options/Next Chapter initiative** that has been launched in Mariposa County (Phoenix metro area). Under this initiative, organizations, including public libraries and community colleges, in four communities – Scottsdale, Mesa, Tempe and Chandler – will help aging Boomers make the transition to the “next chapter” in their lives by setting up centers that provide access to life planning, lifelong learning, and a gateway to civic engagement. The Initiative is being supported by \$1.6 million in grants from The Virginia G. Piper Community Trust (see Attachment D).

- We also heard about the **Neighbors Care Alliance** sponsored by the Pima Council on Aging in Tucson, an intergenerational program through which many community groups are mobilizing to make sure that the aging residents of their neighborhoods get the support that they need to remain independent through the efforts of volunteer caregivers (see Attachment E).

What was most encouraging about these initiatives is the wide range of community institutions and organizations that have gotten involved – including churches, libraries, community colleges, and neighborhood associations – as well as the organizations that traditionally serve older adults.

As this list of projects, most of which have been launched in the past year or two, demonstrates, there is now a good deal of encouraging activity that is occurring in the field of civic engagement on the national as well as the local level. But the support for virtually all of the national initiatives (NCOA, ASA, GSA, Harvard, as well as Civic Ventures) receive their funding from just two sources – the Atlantic Philanthropies and the MetLife Foundation. And the local projects are being funded by a handful of community foundations.

This funding, as important as it is to fostering innovation, will not scale to meet the national need. This funding is finite and, in the case of Atlantic, time limited (the foundation is committed to giving all of its funds away over the next decade then will go out of business). Private support will not be sufficient to bring about the kinds of changes that are needed to respond fully to the challenge and opportunity represented by the 78 million Baby Boomers who are rapidly approaching the "next chapter" of their lives. We need to act on a much larger scale to make sure that we capture the enormous value of their experience and channel it into areas of high social need.

Recommendations

A Civic Engagement Policy Agenda should include several components:

1. **Revise the Older Americans Act** to strengthen and expand the role of the Administration on Aging in developing older adults as a social resource. One possibility is to create a "fund for innovation" within AoA that can be used to create an array of new roles and service opportunities for older adults.
2. **Expand the mandate of the Corporation for National and Community Service** to provide greater and more varied opportunities for senior service. For example, AmeriCorps today is largely oriented toward providing opportunities for youth service. While some older adults are part of AmeriCorps (through Experience Corps), make it more difficult for older

adults to participate over time. One important change would be to modify AmeriCorps' rules to allow older adults to serve for multiple years.

Similarly, Senior Corps' service programs such as Foster Grandparents and Senior Companions are currently limited to the poor elderly by requiring a means test for participation. While these programs are enormously valuable in providing financial support for this needy group, the concept of senior service could be broadened greatly by expanding opportunities for participation in these programs to a larger number of older Americans.

3. **Remove the barriers and disincentives that limit the options for older adults who want to keep working and provide support to those interested in doing "good (socially valuable) work."** Many Americans are interested not just in working for income after they retire, but also in doing work that will make a difference, that will contribute to making their communities better. The government could encourage this movement by providing incentives, through such things as tax credits or support for re-training, for individuals who want to work in areas of high social need.

I would urge the WHCoA to **balance** the important efforts to preserve and strengthen key entitlement programs with initiatives that recognize that the growing number of older of healthy and vital older adults, including a majority of the Baby Boomers, represent a valuable source of human capital that can be mobilized to help address areas of high social need – areas such as education, healthcare, the environment, and human services.

In summary, the WHCoA should recognize that by encouraging the continued engagement and contribution of older population, we have an opportunity to create what Marc Freedman, the founder of Civic Ventures, has called a "win-win of staggering proportions."

Thank you.

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ATTACHMENT A



Civic Ventures is a national nonprofit organization that works to expand the contributions of older Americans to society, and to help transform the aging of American society into a source of individual and social renewal.

The graying of the American population is commonly portrayed as the source of impending strife—the cause of a series of crises related to Social Security, Medicare, greater strains on the family care system, and more. At a time when the middle-aged population confronts ever-increasing demands on their time, and when public funding is desperately short in education, Civic Ventures believes society can no longer afford to overlook—even write off—an older population that should be an enormous resource.

Civic Ventures seeks to tap the talents and skills of older Americans by developing avenues for meaningful service to communities. Civic Ventures promotes new ideas, strengthens infrastructure, and establishes and learns from new institutions.

Civic Ventures' current projects include:

- **Next Chapter™ (Life Options)**

Civic Ventures has developed the Next Chapter concept to assist adults making the transition from midlife to a new life stage characterized by opportunities for connection and direction. The Next Chapter initiative builds on the knowledge that access to meaningful choices for work, service, lifelong learning and unity connections plays an important role in the health and ongoing development of older adults and to linkages to the life of the community and its needs.

- **Still Working**

Civic Ventures is interviewing people in their 50s, 60s, and older who have chosen to make "good work"—work, paid or unpaid, that helps to address a critical need in society—a central focus of their lives. [Click here for more information.](#)

- **Experience Corps®**

Experience Corps is the groundbreaking program that engages Americans 55-plus in vital public and community service. Today more than 1,000 Experience Corps members serve as tutors and mentors to children in urban public schools in a dozen cities across the country. Experience Corps members help teach children to read and develop the confidence and skills to succeed in school and in life.

ATTACHMENT B

Local and National Civic Engagement Projects

Local civic engagement projects now underway include:

- **The Cleveland Successful Aging Initiative**, sponsored by the Cleveland Community Foundation, has provided support for the development of six Lifelong Learning and Development Centers to help older residents remain productively involved in the community. A series of Elder Engagement grants are enabling local agencies to expand paid employment and unpaid service opportunities for older adults. See www.successfulaging.org.
- **The Chicago Life Options Initiative (CLOI)** The Chicago Life Opportunities Initiative (CLOI) seeks to facilitate opportunities for life planning, civic engagement, second careers, lifelong learning, spiritual development, wellness, and access to resources for older adults in Chicago. The CLOI has assembled a broad coalition of public and private partners to guide the Initiative. CLOI is using an asset-based community development model to identify programs that are appropriate to the specific communities and neighborhoods in which it is operating (South Chicago, Chatham, Pilsen and Edgewater). The Initiative is being supported by grants from the Chicago Community Trust.
- **The Philadelphia Coming of Age Coalition** is a community-based initiative whose goal is to increase volunteerism and lifelong learning among that city's baby boomers and retirees. With support from the Pennsylvania Department on Aging, the Coalition is developing a media campaign aimed at local residents, is working with nonprofit organizations to expand meaningful opportunities for older volunteers, and is offering leadership training for 50+ community members.
- **The AdvantAge Initiative in Winter Park, Florida**, is supporting a variety of activities that promote healthy behaviors, encourage lifelong learning, support meaningful service and employment, and make aging issues a community-wide priority. The project started in 2002 with the AdvantAge Initiative Survey that gathered data from more than 600 people over 65 living in Orange County. This was followed by a series of 11 "Frame the Issues" workshops based on data collected from the survey. Recommendations were made and a variety of initiatives were launched including the creation of senior coaching programs, expansion of volunteer management and employment assistance programs, the promotion of culture change throughout the long term care community, and exploration of becoming a Civic Ventures' Next Chapter community. The project has been supported by more than \$2,000,000 in grants from the Winter Park Health Foundation.

Key **national initiatives** include:

- **National Council on the Aging (NCOA).** NCOA's RespectAbility project was launched in 2004 with support from The Atlantic Philanthropies. Key project components include conducting a survey of national nonprofit organizations to determine their interest in and readiness to provide meaningful volunteer opportunities for older volunteers; production of a film for television that portrays issues related to the nation's aging population and its impact upon the workplace, on service and employment and policies; and organizing a series of "town hall" meetings around the country to help raise awareness and increase understanding about how to tap older adults as a resource. (See www.respectability.org.)
- **American Society on Aging (ASA).** As part of a civic engagement initiative announced in early 2005, ASA will:
 - Strengthen the bridge between research and practice by synthesizing current research on civic engagement and providing information that will enable practitioners to put this research into practice;
 - Create a civic engagement "track" within ASA's New Ventures in Leadership program, an eleven-year old leadership development program for professionals representing communities of color.
 - Highlight civic engagement as a major area that journalists who report on aging need to address through ASA's Journalists Exchange on Aging.
- **The Gerontological Society of America (GSA).** With support from the Atlantic Philanthropies, GSA has launched a five year initiative called *Civic Engagement in an Older America that will* promote the study of civic engagement by experts in the field of aging. In early 2005, the project sponsored four WHCoA Forums that focused on issues related to civic engagement. The project will also sponsor a series of special publications (including two issues of *Public Policy & Aging Report*), symposiums at GSA Annual Meetings, and paper awards, and will culminate in a Congressional briefing based on the findings of the project. (For more see, <http://www.geron.org/press/engagement.htm>.)
- **Harvard School of Public Health.** Last year, the Harvard Center for Health Communications launched the Harvard School of Public Health-MetLife Foundation Initiative on Retirement and Civic Engagement. The first stage of the project resulted in publication of "Reinventing Retirement: Baby Boomers and Civic Engagement" that summarizes the current state of knowledge on this issue. In the next phase of the project, the Center will sponsor a national campaign, in collaboration with leading media and entertainment companies, to change public attitudes toward aging and motivate boomers and retirees to engage in community service. (For a copy of the report and other details about the Initiative, see www.hsph.harvard.edu/chc/reinventingaging/index.html.)

ATTACHMENT C**Overview**

Experience Corps® offers new adventures in service for Americans over 55. Now in 13 cities, Experience Corps works to solve serious social problems, beginning with literacy. Today more than 1,500 Corps members serve as tutors and mentors to children in urban public schools and after-school programs, where they help teach children to read and develop the confidence and skills to succeed in school and in life. Research shows that Experience Corps boosts student academic performance, helps schools and youth-serving organizations become more successful, strengthens ties between these institutions and surrounding neighborhoods, and enhances the well-being of the volunteers in the process. Experience Corps is a signature program of Civic Ventures.

The Only Growing Natural Resource

America is undergoing a demographic revolution. In the past 30 years, the number of people over 55 has doubled, and that number will double again as the baby boom generation reaches retirement age. While many are focused on the potential costs of an aging population, Experience Corps sees Americans 55-plus as a powerful new resource to better society. These men and women have the time, talent, and energy, and most important, the desire to make a lasting contribution to society.

Critical Needs

With the growing numbers of two-earner, one-parent, and no-parent households, too many children spend too much time in overcrowded schools and on their own after school, without personal and prolonged contact with adults who care about them. In addition, despite persistent efforts, nearly 40 percent of all American fourth graders read below the “basic” level on a national reading test; the percentages are even higher in many urban schools. Studies have shown that reading ability in the third grade is a major predictor of future educational success. Those who aren’t reading by the end of third grade are far more likely to eventually drop out of school.

Inspiration

The Experience Corps idea originated with John Gardner, former Secretary of Health Education and Welfare, who played a leading role in creating and implementing Medicare and the Older Americans Act. In a 1988 concept paper, Gardner wrote that older people “have an active feeling of obligation to our society and our communities. We know the conventional wisdom is that society owes its older citizens something, and

we would be foolish to quarrel with that. But we owe something too, and this is in one sense our ‘operation give-back.’”

Beginnings

Experience Corps was launched in 1995 with three goals: to channel the talent and energy of growing numbers of older adults into public and community service; to provide significant benefits for the older Americans who participate; and to achieve real outcomes in the community.

Funded by the Corporation for National Service, the original five Experience Corps projects were in New York City, Philadelphia, Minneapolis, Portland (Oregon), and Port Arthur (Texas). Each of these projects is still in operation today. Additional sites were added later, and currently Experience Corps is operating in a dozen cities with more than 1,000 participants.

Experience Corps became part of the AmeriCorps network of national service programs in 2001, and today Experience Corps is the largest AmeriCorps program focused on engaging older adults. While support from AmeriCorps is important, more than 50 percent of funds come from other sources including foundations, the private sector, and other public resources.

Critical Program Elements

Experience Corps’s approach breaks new ground and sets the standard for excellence by combining several critical program elements.

- * Experience Corps members *make a substantial commitment* to the project, with each participant devoting a significant number of hours to tutoring and mentoring each week.
- * Experience Corps members receive *rigorous training* in early childhood education and literacy.
- * Experience Corps members *work in teams*, developing strong and supportive networks of colleagues.
- * Experience Corps projects place *a critical mass* of tutors and mentors at each school, so that the presence of the older adults changes the climate of the entire school.
- * And Experience Corps members *lead by example*, engaging in the life of the school and community and changing perceptions about aging. Many take on key leadership roles, helping set program direction and bringing new and creative leadership to the schools where they serve.

Network Cities and Hosts

Experience Corps is a signature program of Civic Ventures, a national nonprofit organization that works to expand the contributions to society of Americans 50 and above and to help transform the aging of America into a source of individual and social renewal. Experience Corps projects are located in the following 13 cities: Baltimore, Boston,

Cleveland, Indianapolis, Kansas City, Minneapolis, New York, Philadelphia, Port Arthur, Texas, Portland Oregon, San Francisco, Tucson, and Washington, D.C.

In each city, Experience Corps is hosted by a community-based nonprofit organization that shares Experience Corps's goals and values.

Success & Recognition

Independent researchers have documented the positive effects of Experience Corps, both for the academic and social progress of the children served and for the health and well-being of the tutors and mentors. In addition, Experience Corps has won awards both nationally and locally and is routinely lauded by national and local political leaders, the media, school principals and teachers, parents, and students. *The New York Times* writes: "If the world of the retiree is undergoing a sea change, then the Experience Corps is playing a central role in that change."

Experience Corps was also one of a dozen "success stories" cited in *Better Together: Restoring the American Community* (Simon & Schuster, 2003) by Robert Putnam, Harvard professor and author of *Bowling Alone*, and Lewis Feldstein. The authors write: "The reading scores of 75 percent of Experience Corps students in Philadelphia have increased one grade level. Attendance among the students tutored has improved. Surveys of volunteers taken at the beginning of their participation in the pilot program and at the end of the two-year pilot show a significant increase in their sense of purpose and energy and a significant decrease in loneliness." Beyond numbers, Putnam and Feldstein cite the less tangible but "probably more important" results – "the greater pride and hopefulness of students, the lessons they learn about caring and civility; greater connection and respect among generations; a richer school environment; [and] a new sense of the possibilities of...the third age."

The Future

Based on research results and sustained positive feedback, Experience Corps will continue to grow, adding new members, new school sites, new cities, and new opportunities for Americans 55 and beyond to take civic action and leadership. While Experience Corps is now focused on tutoring and mentoring in public schools, future projects may focus on other avenues for engaging many more older adults in vital public and community service.

Contacts

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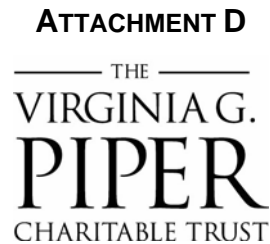
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**Civic Engagement/Meaningful Opportunities:
Developing Life Options Centers
in Maricopa County, Arizona**

On September 1, 2004, the trustees of The Virginia G. Piper Charitable Trust awarded \$1.6 million to four organizations to develop Life Options Centers in the metropolitan Phoenix, Arizona region. The multi-year grant funds will support the implementation of these centers, based on five core components included in the *Life Options Blueprint* developed by the Maricopa Commission on Productive Aging and available on the Piper Trust website at www.pipertrust.org.

The Blueprint's five core components are: life planning programs; a gateway and venue for civic engagement; lifelong learning for new careers and enrichment; spaces and programs that promote social connections and foster a community for all ages; and information and assistance with resource navigation. The four centers will provide a location, programming and links to options, information, activities and others engaged in a search for a new focus for the twenty to thirty years of post-retirement time. The centers will assist individuals in the transition to individual and social renewal. A key component of these centers is civic engagement or involvement in meaningful activities.

The four funded projects and contact people are listed below:

1. ***Tempe Connections***, City of Tempe, Judy Tapscott, Social Services Manager, 480-350-5400.
2. ***Chandler's Next Chapter Community***, City of Chandler Public Library, Brenda Brown, Head Librarian, 480-782-2817, Brenda.brown@ci.chandler.az.us.
3. ***Mesa Life Options***, Mesa Community College, Barbara Thelander, Director of Community and Continuing Education, 480-461-6256, thelander@mail.mc.maricopa.edu.
4. ***Scottsdale Life Ventures Program***, Scottsdale Community College, William Pokorny, Program Coordinator, 480-423-6551, bill.pokorny@sccmail.maricopa.edu.

Descriptions of each of these projects are included below.

Engagement Category	Sample Activities
Mentoring	Sites such as the school for homeless children, Boys & Girls Clubs, after-school enrichment programs in public schools; program for pregnant/postpartum homeless women
Peer coaching	Older adults will be trained as peer coaches to assist with life planning needs
Volunteering in city programs	Volunteers will be recruited for Crisis Response Teams (fire and police departments), museum docent program, youth sports, library, adult center, cultural services
Volunteer Fair	Annual event to highlight volunteer opportunities and recruit interested older adults
Understanding and participating in public policy development and discussion	Workshops to inform older adults about public issues and encourage participation, enlist help with elections, voter registration, forums on public issues
Volunteering for community projects	Made A Difference offers opportunities for a variety of different community projects on a one-time or multiple project schedule
Leadership development of volunteers	Educate older adults about opportunities to participate on boards or committees of nonprofit and public service organizations
Training of nonprofit agencies on use of volunteers	Nonprofit agencies will be trained on effective ways to use older adult volunteers based on recent national volunteer surveys
Clearinghouse of volunteer opportunities	Utilize the Volunteer Center, Retired Senior Volunteer Program, Make-A-Difference, United Ways, hospitals and others to create a central database of opportunities
Service learning opportunities	Pair older adults with community college students in service learning projects

For more information, please contact:

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Tempe Connections

The City of Tempe, in collaboration with its citizens and community organizations, is developing an innovative initiative targeted to meet the needs of the baby boomer population. *Tempe Connections* will provide a comprehensive one-stop resource to connect this large group of boomers and other young seniors with information services and programs they need to remain informed, engaged, and happy community participants. We aim to provide them with “what’s in it for me” services as well as entice them to share their skills and experience for the benefit of all age groups in Tempe. *Tempe Connections*, to be located at the Tempe Public Library, will include a café for socialization and additional square footage for educational, volunteer and information gathering opportunities.

Based on the guiding principal of participant inclusiveness, the City of Tempe will establish *Tempe Connections’* programs using a three-year plan that involves stakeholders in their development and ongoing operation, including evaluation and improvement implementation. *Tempe Connections’* key development milestones include:

- **Construction of the Connections Café and program space** (Years 1 and 2). *Tempe Connections* will be the hub of program planning, social connections, and information and referral services. A café, open to all Tempe citizens, will act as the focal point for socialization. Connected to the café will be meeting and program space reserved specifically for *Tempe Connections* participants. A concierge will be available to assist with questions and information referral.
- **Recruitment of a Citizen Advisory Board.** The advisory board will partner with the City to lead the development of programs, financing, marketing, staffing and construction.
- **Dynamic program delivery.** Over two dozen community organizations and educational institutions will partner with the City of Tempe to participate in the development and delivery of broad-based program offerings. A few highlights include:
 - Lifelong learning and new career opportunities in partnership with Arizona State University, Maricopa County Workforce Development and other partners.
 - Life planning workshops
 - Wellness classes and exercise sessions
 - Civic engagement through peer coaching, Tempe Connections Corps, links to the City of Tempe Volunteer Office, Mesa Community College and community connections.
 - Information and referral services

Tempe Connections will incorporate positive actions and energy to capture imaginations and meet the needs of baby boomers as they transition into their next chapter of life.

Chandler's Next Chapter Community

The vision of Chandler's Next Chapter Community project is to connect persons in the general age range of 45 – 65 with community resources for life planning, re-careering, lifelong learning, wellness, serving the community, plus friends and fun. The intent of our project will be to reach the baby boomer population and respond to the younger age range and more active lifestyle. The Chandler community has traditionally addressed the needs of the senior community through a number of programs, agencies, and resources. Now we recognize a new segment of our population who will require a different level of service or opportunity as they approach their retirement years.

Our goal is to make Chandler a "Next Chapter Community," in lieu of creating a single Center. Besides the fact that no single agency could provide the full range of services required of a Next Chapter project, one center could not address the needs of all boomers living within the 75 square miles of the community (including Sun Lakes). Chandler's Next Chapter program is a virtual entry to the next chapter of life. It provides resource navigation, tools and technical assistance for baby boomers and their families addressing life planning, lifelong learning, civic engagement, social connections, and re-careering. We envision that program components will be accessed by participants in a cyclical fashion.

Points of Entry

- a. Summit - *large-group forums offering an overview of issues confronting older adults, programs and services available through the Next Chapter projects, and other community resources*
- b. Centers – *six locations throughout the community including libraries and community college locations*
- c. Web Site - *Primary information source regarding the project, including partners, programs & services available, and links to other relevant information sources*

Information/Resources - *Collection of print and non-print resources as well as relevant links to the project web site.. Trained reference librarians will assist to elicit a clear understanding of the information needed by the customer and to assist him or her in locating and making use of accurate, authoritative sources for that information.*

Services

- a. Life Planning - *Transitional Employees Academy, Next Chapter Passport Series, and Peer Counseling*
- b. Lifelong Learning – *Clearinghouse for current offerings in the Community. Development of new classes*
- c. Social Connections – *Self directed support and social groups, space for informal gatherings*
- d. Civic Engagement – *Chandler Fellows program, Nonprofit academy, peer coaches, career coaches*
- e. Recareering – *Assessments, programs, LEED, Boomer Job Fair*

Community Project Team:

Chandler Public Library, Chandler-Gilbert Community College/Sun Lakes Education Center, Chandler Regional Hospital, Chandler Nonprofit coalition, Chandler Unified School District, City of Chandler, Intel, and the Friends of the Chandler Public Library.

Mesa Life Options

Mesa Community College has joined with Mesa Senior Services, Inc. and the City of Mesa in a unique public/private collaboration formed to create Mesa Life Options (MLO).

Target Population: Mesa citizens transitioning from middle age to 3rd age.

Vision: Mesa Life Options provides mid-life and older adults with tools and resources that assist their transition to a new stage of life while learning new skills, taking advantage of new opportunities, and meeting new challenges.

Mission: The mission of Mesa Life Options is to promote new perspectives for residents as they age, and to provide resources that are responsive and adaptable, offer renewal and are inclusive.

Programs and services:

- Life Planning programs and peer life coaches
- Gateways to opportunities for civic engagement and volunteerism
- Lifelong Learning for intellectual growth and re-careering
- Identified spaces in partner facilities for programs, resource navigation and social interaction
- Linkages to current and emerging services within the Mesa community and beyond.

Current client information indicates that Mesa Life Options has the potential to reach over 10,000 adults who will participate in some aspect of the program in the first year of operation. The programs are designed to assist the pre-retired and recently retired residents, ages 45-70.

Goals:

- Develop pathways for a 3rd age population that will facilitate planning for the next phase of their life.
- Identify destination sites within partner facilities where resources exist or can be developed that provide *options* for Mesa residents in the determination of their life choices.
- Link existing learning, employment, civic engagement/volunteer, wellness, and social opportunities through Mesa Life Options, utilizing web-based information systems and existing community organizations.
- Engage mid-lifers in the community through community projects and volunteer opportunities.
- Create within the partner organization's facilities, Life Options Centers that are clearly identified as Mesa Life Options, and are welcoming, invite social interaction, provide access to information either on-line or in person, are handicapped accessible with convenient parking.
- Join with the other Maricopa Life Options programs to exchange information, share resources and build relationships, which will enhance all of the Valley Life Options projects.
- Create a private/public partnership model that contributes to the national knowledge base, and that attracts local and national support and recognition.
- Develop new programs and adapt existing programs and services for inclusion within Mesa Life Options.

Scottsdale Community College *LifeVentures*

Scottsdale Community College (SCC) has been selected by The Virginia G. Piper Charitable Trust as the lead and fiscal agent for a Life Options program. The program, *LifeVentures*, anticipates and proposes to respond to the demographic imperatives and the rapid culture change processes incidental with the aging members of the “Baby Boom” generation in the United States.

The **vision** of *LifeVentures* is to create a multigenerational and multicultural environment to effect positive culture change, improve lives, and meet the emerging needs of the third age generation.

The **mission** commits SCC to opening a *LifeVentures* Center on campus that will be a welcoming place where maturing adult residents of Scottsdale and the surrounding communities will discover a variety of resources to volunteer, pursue civic engagement, re-career and find employment, as well as to engage in lifelong learning, embark on healthy lifestyles, and enjoy social connections in a community for all ages.

The **project design** will occur in three phases over three years, with the intent of progressively reaching a level of economic and fiscal sustainability. The first phase will focus on the design and implementation of a one-stop shop where maturing adults can obtain information to make choices for the “third age” of their life cycle. In a setting that is comfortable, accessible and private, with computer stations for navigating on line resources and access to community resource information, a trained staff will assist participants in developing comprehensive life planning that extends beyond traditional career and retirement planning efforts and provides opportunities for connection and direction. The services will aid in setting achievable goals, exploring volunteer and/or re-careering opportunities, lifelong education, health and wellness, and a myriad of enriching and engaging activities. An overarching principle for life planning is not only to uncover the passion but also to help participants become connected in a meaningful way to their community. In support of lifelong learning, the program will provide quality faculty led non-credit education for personal enrichment.

Following the process of building the infrastructure for *LifeVentures*, phases two and three will focus primarily on expansion. Successes from initial endeavors will be replicated in satellite centers at partner organizations throughout the community. Knowledge of what works and what does not work will allow for greater inclusion strategies, new programs, larger marketing efforts, and training/mentoring of new *LifeVentures* community partners. The expansion also provides opportunities to attract additional sponsors and participants to help *LifeVentures* move toward financial independence and sustainability.

The *LifeVentures* Program will be deemed effective if it enriches the quality of life for retirees. Since quality of life is highly individual and subjective, it will be necessary to measure it via a survey instrument.

Measurement will utilize a pre/post/follow-up design.

ATTACHMENT E
Neighbors Care Alliance
Tucson, Arizona

The purpose of NCA is to assist neighborhoods & faith communities in creating or strengthening volunteer caregiver programs. The goal is to help seniors remain independent and in their homes as long as possible. It also provides additional resources and support to their caregivers. The Alliance is a partnership between Pima Council on Aging (PCOA), Northwest Interfaith Center (NWIC), Catalina Community Services and Old Fort Lowell Live-At-Home Program. The latter three have long-established volunteer caregiver programs.

Depending on the needs of the community, NCA will help set up or strengthen a volunteer caregiver program to provide services such as friendly visits, run errands, grocery shopping, telephone reassurance, rides to and from appointments, help with house or yard, light housekeeping, meal preparation, respite, etc.

The Neighbors Care Alliance can help communities connect with surrounding neighborhoods/faith communities and collectively pull together to develop or strengthen a volunteer caregiver program. They help local groups to determine what the needs are in their communities. Based on the type of services needed, they provide help in recruiting, training and supporting volunteers.

Regular meetings and other communication means provide the opportunity for the NCA Program Coordinators to meet and exchange information about their programs, review "best practice" ideas and receive information on other services that are available to seniors in their programs. For information about the program or to arrange a meeting to explore starting a program, contact the Alliance Outreach Coordinator at 790-7262.

ATTACHMENT E